MOMENTUM
Knowledge Accelerator

October 28, 2022 Draft

CAPACITY MAPPING SYSTEM
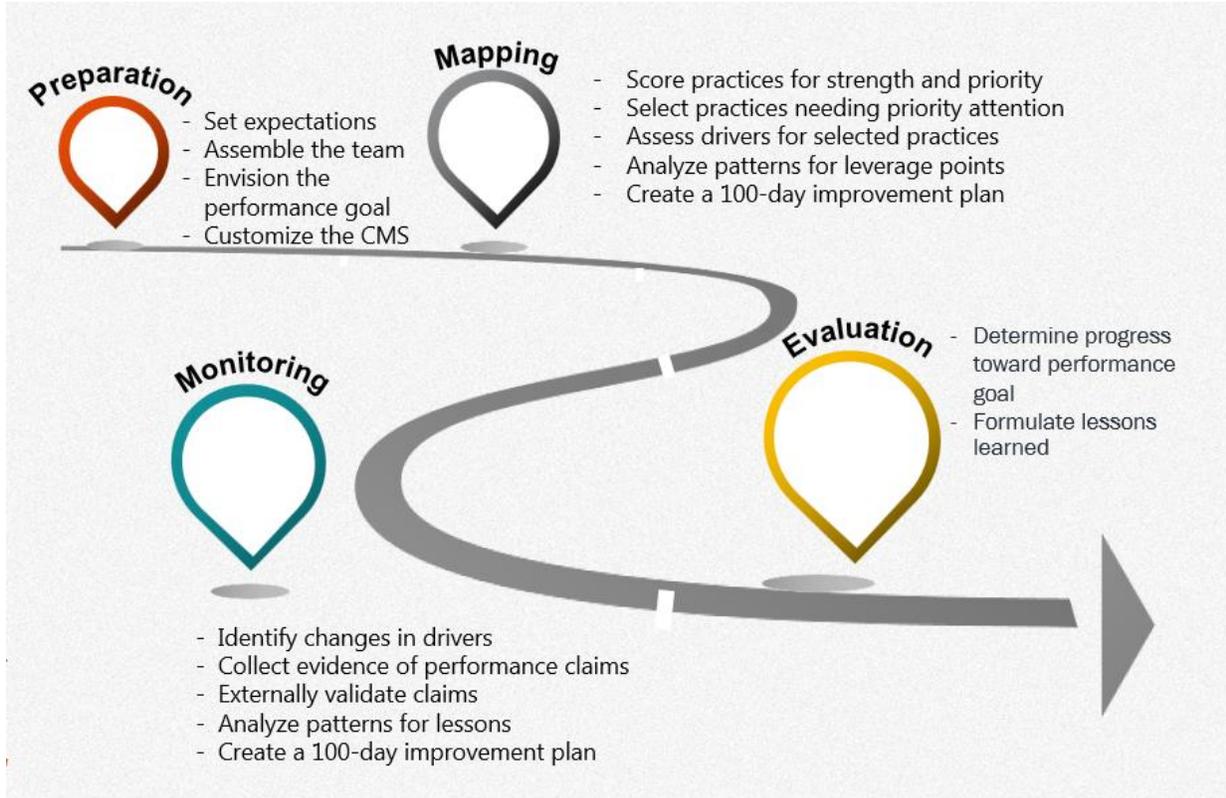
CMS Templates

For use with MindManager or Card & Chart options

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INTRODUCTION

The CMS Roadmap

Preparation
- Set expectations
- Assemble the team
- Envision the performance goal
- Customize the CMS

Mapping
- Score practices for strength and priority
- Select practices needing priority attention
- Assess drivers for selected practices
- Analyze patterns for leverage points
- Create a 100-day improvement plan

Evaluation
- Determine progress toward performance goal
- Formulate lessons learned

Monitoring
- Identify changes in drivers
- Collect evidence of performance claims
- Externally validate claims
- Analyze patterns for lessons
- Create a 100-day improvement plan

LIST OF TEMPLATES

PREPARATION PHASE

Guding Organizational Vision[1]

Organizational Vision *Describe the vision of the organization in future, operating at its ideal level of performance within a chosen timeframe (3 years, 5 years, or end of a specific capacity strengthening project) ...*
Organizational Interests: *(Record 1-2 accomplishments that will mark successful achievement of your vision, such as meeting specific quality standards, expanded client reach, increased donor base, NUPAS certification, etc.)* • •

CMS Leadership Team Members

Name	Position (Board, staff, volunteer)	Level of affiliation (FO, HQ, other)	Role on Team (Facilitator, data manager, reporter, other)

CMS Core Team Members

Name	Position (Board, staff, volunteer)	Level of affiliation (FO, HQ, other)	Role on Team (Facilitator, data manager, reporter, other)

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[1] Note: This step in the CMS can contribute toward CBLD-9 monitoring in that it provides: a) an intentional and documented a process of performance improvement; and b) key performance metrics by which to demonstrate improvement

Evidence Validation Panel Members

Name	Position (Board, staff, volunteer)	Level of affiliation (FO, HQ, other)	Role on Team (Facilitator, data manager, reporter, other)

Customizing the CMS

Customization Choices	Decision
What will be the mapping platform?	(*Check one*) ❑ Excel templates ❑ Card & Chart
Who will receive the mapping findings?	(*Check all that apply*) ❑ Internal staff ❑ Board / governing body ❑ Peer organizations ❑ Community members ❑ Implementing or sponsoring partner ❑ Current or potential funders
Will the mapping be done in-person or virtually?	(*Check all that apply*) ❑ In person ❑ Virtually
Over how many sessions will the mapping be done?	(*Fill in the blanks*) # Sessions per day: ____ # Hours per session: ____ # days duration: ____

MAPPING PHASE

Mapping Worksheet

Domain	Practice Statements	Priority Rating	Performance Rating	Urgency	Performance Drivers				
					K/S	Res	Rel	L	N
Attracts & sustains support	1. *Regularly* communicates with *stakeholders* about organizational achievements and challenges								
	2. Provides stakeholders, *on an ongoing basis,* with *meaningful* opportunities to contribute to the organization's work								
	3. *Actively* participates in multi-stakeholder networks								
	4. *Frequently* shares useful information and valuable resources with peer organizations								
	5. *Frequently* takes joint action with *cross-sectoral actors* to address issues of common concern								

Key Terms

Performance Rating	Priority Rating	Performance Drivers	Driver Rating	Urgency Index
Strength: This statement very accurately describes us **Asset**: This statement somewhat accurately describes us **Challenge**: This statement is far removed from what we do	**High**: Critical to success **Medium**: Important but not critical **Low**: Not important	K/S: Knowledge or skills Res: Resources Rel: Relationships SL: Supportive leadership N: Norms or culture	▪ Inadequate ▪ Partially adequate ▪ Fully Adequate	

Urgency Index grid:

Priority Rating	Challenge	Asset	Strength
high	NEED	NEED	NICE
med	NEED	NICE	NOT
low	NICE	NOT	NOT

Performance Rating

Domain	Practice Statements	Priority Rating	Performance Rating	Urgency	Performance Drivers				
					K/S	Res	Rel	L	N
Builds agility	6. *Routinely* tasks cross-functional teams to meet objectives								
	7. Consistently *takes steps to recruit staff members from the local community.*								
	8. *Consistently* manages finances so that *stakeholders* receive timely, useful and accurate information.								
	9. Secures *sufficient* support from different sources to ensure that funding streams are diversified								
	10. Maintains reserve funds to cover at least two months of operational activity.								

Key Terms

Performance Rating	Priority Rating	Performance Drivers	Driver Rating	Urgency Index
Strength: This statement very accurately describes us **Asset**: This statement somewhat accurately describes us **Challenge**: This statement is far removed from what we do	**High**: Critical to success **Medium**: Important but not critical **Low**: Not important	K/S: Knowledge or skills Res: Resources Rel: Relationships SL: Supportive leadership N: Norms or culture	✓ = Driver supports performance - = Driver blocks performance	

Urgency Index:

Priority Rating (vertical axis): high / med / low
Performance Rating (horizontal axis): Challenge / Asset / Strength

	Challenge	Asset	Strength
high	NEED	NEED	NICE
med	NEED	NICE	NOT
low	NICE	NOT	NOT

Domain	Practice Statements	Priority Rating	Performance Rating	Urgency	Performance Drivers				
					K/S	Res	Rel	L	N
Fosters self-determination	11. *Regularly* communicates a transformative vision of an ideal future *to diverse stakeholder groups*								
	12. *Routinely* takes initiative to mobilize resources as new community needs emerge								
	13. *Routinely* sets aside times for staff, volunteers and stakeholders to reflect on values and practices								
	14. Consistently *demonstrates practices* that builds leadership capacity all staff levels								
	15. *Periodically* identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development								

Key Terms

Performance Rating	Priority Rating	Performance Drivers	Driver Rating	Urgency Index
Strength: This statement very accurately describes us **Asset**: This statement somewhat accurately describes us **Challenge**: This statement is far removed from what we do	**High**: Critical to success **Medium**: Important but not critical **Low**: Not important	K/S: Knowledge or skills Res: Resources Rel: Relationships SL: Supportive leadership N: Norms or culture	▪ Inadequate ▪ Partially adequate ▪ Fully Adequate	*Priority Rating* high: NEED | NEED | NICE med: NEED | NICE | NOT low: NICE | NOT | NOT Challenge | Asset | Strength *Performance Rating*

Domain	Practice Statements	Priority Rating	Performance Rating	Urgency	Performance Drivers				
					K/S	Res	Rel	L	N
Learns & adapts	16. *Routinely* solicits and uses stakeholder feedback to expand impact								
	17. *Regularly* scans for trends relevant to organizational mission and services								
	18. Regularly uses data to monitor project performance								
	19. Meets *regularly* to learn lessons from project successes and failures								
	20. *Routinely* fosters innovations by testing out new ideas								

Key Terms

Performance Rating	Priority Rating	Performance Drivers	Driver Rating	Urgency Index
Strength: This statement very accurately describes us **Asset**: This statement somewhat accurately describes us **Challenge**: This statement is far removed from what we do	**High**: Critical to success **Medium**: Important but not critical **Low**: Not important	K/S: Knowledge or skills Res: Resources Rel: Relationships SL: Supportive leadership N: Norms or culture	▪ Inadequate ▪ Partially adequate ▪ Fully Adequate	

Urgency Index (Priority Rating vs Performance Rating):

Priority Rating	Challenge	Asset	Strength
high	NEED	NEED	NICE
med	NEED	NICE	NOT
low	NICE	NOT	NOT

Performance Rating

Domain	Practice Statements	Priority Rating	Performance Rating	Urgency	Performance Drivers				
					K/S	Res	Rel	L	N
Produces sustainable results	21. *Consistently* offers services that reflect user needs and preferences								
	22. Routinely works with stakeholders to create a strategy for sustaining results when external support ends								
	23. *Periodically* assesses current practices against quality standards								
	24. *Regularly* works with local communities to build upon their assets and ideas								
	25. *Consistently* promotes solution to develop challenges that address root causes								

Key Terms

Performance Rating	Priority Rating	Performance Drivers	Driver Rating	Urgency Index
Strength: This statement very accurately describes us **Asset**: This statement somewhat accurately describes us **Challenge**: This statement is far removed from what we do	**High**: Critical to success **Medium**: Important but not critical **Low**: Not important	K/S: Knowledge or skills Res: Resources Rel: Relationships SL: Supportive leadership N: Norms or culture	■ Inadequate ■ Partially adequate ■ Fully Adequate	

Urgency Index grid:

Priority Rating \ Performance Rating	Challenge	Asset	Strength
high	NEED	NEED	NICE
med	NEED	NICE	NOT
low	NICE	NOT	NOT

DATA GATHERING AND PLANNING

Evidence Summary Grid

Evidence can be in the form of an activity report; manual; newsletter; curriculum; survey results; budgets; excerpts from a strategic plan; meeting minutes or agendas; evaluation findings; etc. It can also include structured observations; interviews with participants; multimedia testimonials; and the presentation of tangible results.

It is not necessary to provide a unique piece of evidence for each capacity practice. Occasionally, a single item may provide evidence for several practices across multiple domains. Select evidence, whenever possible, that is not more than 18 months old.

Attach evidence in hard copy or electronic form to this template.

Name of Organization:

Capacity Domain:	FOSTERS SELF-DETERMINATION	
Capacity Practices	*Evidence Presented (by Name) to Support Ratings*	*Source*
✓		
✓		
✓		

Example:

Capacity Domain:	FOSTERS SELF-DETERMINATION	
Capacity Practices	*Evidence Presented (by Name) to Support Ratings*	*Source*
A1. Routinely takes initiative to mobilize resources as new community needs emerge	✓ Two programming staff on extended sick leave due to COVID-19	Staff roster
B1. Consistently demonstrates practices that builds leadership capacity all staff levels	✓ Senior management team designed staff development plans for each of their teams	Senior staff meeting minutes 3/19/22

Evidence Quality Review Scoresheet

[*for use by the Evidence Validation Panel*]

Name of Organization:

Evidence Validation Panel Members:
-
-
-

Date of Validation:

TOTALS	Subtotal for *Relevance:*	Subtotal for *Sufficiency:*	GRAND TOTAL:	
Evidence	Relevance Score (0-2)	Sufficiency Score (0-2)	Evidence Score	Evidence Accepted? (Yes/No)
ATTRACT AND MAINTAIN SUPPORT				
Sa1				
Sb1				
Sb2				
Notes:				
PRODUCE RESULTS				
Pa1				
Pb1				
Notes:				
ALIGN SYSTEMS FOR AGILTY				
Aa1				
Ab1				
Notes:				
LEARN AND ADAPT				
La1				

Lb1				
Notes:				

ATTRACT AND MAINTAIN SUPPORT				
Sa1				
Sb1				
Notes:				

NOTES

Scoring Scale:
- 2 = The evidence completely supports the rating assigned by internal assessment team.
- 1 = The evidence partially supports the rating assigned by internal assessment team.
- 0 = The evidence does not supports the rating assigned by internal assessment team in any way.
- When no evidence is provided (in the case of "Developing" ratings), record "NE" in the grid

NOTE: The internal assessment team does not need to provide evidence to justify a rating of "Developing." Evidence is only required to support ratings of "Accomplished" and "Exemplary." Use the comments section of the scoresheet to explain ratings of "Developing."

RESULTS CALCULATION: If the total evidence score reported in the last column is…
- 3 or 4, the internal assessment team's rating will be accepted
- 2, the internal assessment team's rating will be accepted with reservation
- 0 or 1, the rating should automatically be changed to "Developing."

100-Day Change Plan

100-day Change Plan			
Plan start date: _____ **Plan end date:_____** **Activity manager: _____**			
Performance Goal:			
Priority Practices Areas *Top 3 Practice statements that are the focus of performance improvement*	1. 2. 3.		
Measurable Results *Qualitative or quantitative metrics that will give evidence of enhanced performance*	• •		
Performance Drivers *Which performance drivers were identified as critical to the practice performance, either as an enabler or inhibitor?*	*Enablers* • •		*Inhibitors* • •
Change Strategies ? *What key methods will be tried to shift or leverage the performance drivers?* ? *Rationale for methods chosen*			
Actions to be taken 1. 2. 3.	*Person Responsible*	*Start*	*End*
Required Commitments *What commitments or authorizations are needed from recipients, leaders or change agents regarding time, cost, or change strategies?*			

MONITORING PHASE

Progress Monitoring Template

<u>Name of Organization:</u>

Capacity Domains	Practices	Performance			Drivers					Progress		
		Strength	Asset	Challenge	Relationships	Resources	Leadership	Knowledge / Skills	Norms	Exceeds Expectations	On Track	Obstacles Encountered
1. Fosters Self-Determination	a.			√	▪	▪	▪	▪	◖			√
	b.		√		▪	◖	◖	◖	▪	√		
	COMMENTS: a.											
2. Produce Sustainable Results	#1											
	#2											
	COMMENTS:											
3. Align Systems for Agility	#1											
	#2											
	#3											
	COMMENTS:											
4. Learns and Adapts	#1											
	#2											
	COMMENTS:											
5. Attracts and Sustains Support	#1											
	COMMENTS:											

Progress Learning

What progress are we making that we expected to see?

       What were the key contributors to that progress?

What progress are we <u>not</u> making that we expected to see?

       What were the key contributors to that lack of progress?

List 3-5 important lessons learned at this point in the plan's implementation
-
-
-
-

What corrective action is needed for milestones are not accomplished or schedule?

Needed plan revisions:
-
-
-
-

Actions we can take to generate and maintain momentum for change:
-
-
-
-